

Somerville Retirement Board

Retirement Member Services Coordinator/Administrative Assistant

Acting under the direction of the Executive Director of the Retirement Board, the Retirement Member Services Coordinator/Administrative Assistant will assist the Executive Director and the Deputy Director in the daily administration and operation of the Retirement Office. The Retirement Member Services Coordinator/Administrative Assistant must possess and maintain a thorough knowledge of Massachusetts General Law Chapter 32, current regulations of the Public Employee Administration Commission (PERAC) and Somerville Retirement Board Supplemental Regulations and Policies and Procedures.

Support and assist the Executive Director in the daily administration of various types of pension benefits for active, inactive and retired members of the Somerville Retirement System. Also assists the Executive Director in responding to various requests received from other Contributory Retirement Systems within the Commonwealth of Massachusetts.

Essential Duties:

- Support the Executive Director in the enforcement of all regulations pertaining to public pension benefits, as they pertain to the membership of the Somerville Retirement System, as prescribed by MA G.L. Chapter 32, PERAC regulations, Somerville Retirement Board Supplemental Regulations and Policies and Procedures, appeal decisions of DALA and CRAB, EEOC decisions, IAB regulations/decisions, IRS and DOR regulations.
- Responsible for comprehensively managing the proper, timely and accurate enrollment of all **new members** entering the system, ensuring that the new employees of the City of Somerville and the Somerville Housing Authority meet the membership criteria as prescribed by MA G.L. Chapter 32 and Somerville Retirement Board Supplemental Regulations. Responsible for creating and maintaining automated records and digital files for all members utilizing Pension Technology Group (PTG) software.
- Responsible for managing and maintaining the **PTG database**, timely and accurately, on a continuous basis.
- Responsible for importing and uploading all **member deductions** into the PTG database.
- Process all **Cash Receipts and monthly Cash Disbursements** in PTG timely and accurately.
- Responsible for the processing and performing all requested inactive member **Refunds and Rollovers** of their annuity account, including DOR child support lien verification.
- Responsible for professionally greeting visitors to the office, answering the telephone lines, filing, photocopying and scanning, sorting mail received, shredding and processing all outgoing **mailings**.
- Responsible for supervising and processing the **Transfer** of membership to and from the 104 contributory retirement systems within the Commonwealth of Massachusetts.
- Responsible for managing the preparation and submission process of the bi-annual **COLA Report** (deceased retirees) to the State each June and December.

- Responsible for managing and supervising the processing, mailing and monitoring the proper receipt of the **Affidavits** (verification form) from all pension recipients and reporting filing non-compliance to the Executive Director for suspension of benefits.
- Manage and maintain the **PERAC 3(8)(c) letters** and control spreadsheet and assist with the annual 3(8)(c) receivable invoice process, providing status/tracking of the annual 3(8)(c) payables and receivables.
- Supervise the coordination, preparation, review and issuing of the **annual member statements**.
- Responsible for assisting and coordinating with members and retirees with the proper completion of Change of Beneficiary and Change of Address forms and manage updating the records accordingly in the PTG database.
- Support the Executive Director/Election Officer in conducting Retirement Board Member elections, managing the mailings and voter list.
- Responsible for managing and ordering adequate office supplies and the operation of a variety of office equipment machines (computer, telephone, photocopier/scanner, postage machine, adding machine and paper shredder).
- Support, assist and coordinate with the Deputy Director with the annual issuance of 1099-R forms and Group 4 letters.
- Support and coordinate with the Executive Director and the Deputy Director in the preparation of each board meeting agenda and related required supporting materials and documents, including the proper posting of each meeting in accordance with the current open meeting laws.
- Manage the monitoring of the deaths of retirees and submitting monthly PTG file to Pension Benefit Information (PBI).
- Supervise the custody, moving, disposal, and coordination of storage with Morgan Records Management of all retirement system records and files, while maintaining confidentiality and the integrity of the records at all times.
- Attend educational and training seminars as required.

Secondary Duties:

Performs other related duties as prescribed by the Executive Director, Retirement Board Members, Massachusetts General Laws and PERAC.

Required Qualifications:

In order to effectively and successfully perform this job, an individual/candidate must possess very good analytical/problem solving skills, excellent oral and written communication skills, the self-confidence to exercise independent judgement and the ability to identify and refer impending problems to the Executive Director, strong organizational and interpersonal skills and the ability to independently prioritize work assignments in order to ensure their accurate and timely completion.

Education and Experience:

A qualified candidate should possess an Associate's degree in accounting or business related discipline from an accredited college or university plus a minimum of 2 years of business related experience within a MA Chapter 32 public retirement system. Strong knowledge of and experience with MA G. L. Chapter 32, PERAC regulations and automated accounting systems; PTG software preferred. Must possess knowledge of accounting principles and practices and business. Must possess proficient Personal

Computer skills: Microsoft Office Excel and Word; Pension Technology Group (PTG) software or automated accounting system. Ability and willingness to continuously upgrade accounting and retirement benefit skills by attending training.

Work hours: 8:30 AM to 5:00 PM Monday through Thursday and 8:30 AM to 1:30 PM Friday.

Office is closed on Fridays (work remotely 8:30 AM to 1:30 PM); Potential to work 1 other additional day remotely.

Extremely competitive market value Salary [commensurate with experience] and excellent benefit package.

Please submit a cover letter and resume to:

Michael Pasquariello
Executive Director
Somerville Retirement Board
323 Broadway
Somerville, MA 02145

Or via **e-mail to:** mpasquariello@somervillema.gov.

This position will remain open until a qualified applicant is obtained.

The Somerville Retirement Board is an affirmative action/equal opportunity employer and does not discriminate on the basis of race, color, sex, religion, age, national origin, disability or any other protected category.